Online Sales Report User Guide

The Online Sales Report application is designed for the assessment community and ORPTS staff to produce the Online Sales Report. This report is similar to and serves as a replacement for the Quarterly Sales Report which had been previously mailed or delivered by the CRM, on a quarterly basis, to all municipalities throughout the state. The Online Sales Report application will provide assessors and their staff the ability to produce/access the reports at their convenience in order to verify the RP-5217 data and confirm the data they provided to ORPTS via RPS035 transmittals or paper corrections is reflected accurately. Reports can be generated based on the user’s needs and include the Arms Length Sales Reports, Potential Contradictions Reports, and Excluded Sales Reports. The time frame to be queried is adjustable, so the user can tailor their report(s) to encompass any range of dates they desire.

This guide is designed to give the user a brief overview of the application. Additionally, there are help screens within the application to further guide the user. If more assistance is needed, the user may call the Solutions Center at 518-591-5233.

Getting Started

By using their Secure Assessment Community Account, users can access the Online Sales Reports application. The application will ask you to agree to a disclaimer statement. After reading, click on “Yes I do accept”. You will then be brought to the main online sales report page.

Setting up the Reports

This page, also referred to as the home page, is where the criteria for the report are selected. The user can select a report from the following options:

- Arm’s Length City / Town
- Arm’s Length Village
- Potential Contradictions
- Excluded Sales

Once a report type is selected, a SWIS must also be selected. Users will have limited access to SWIS codes only in their realm of jurisdiction. For the Arm’s Length Village option, only villages that are assessing units will appear.

Finally, choose a date range to run the report on. Dates must be entered in mm/dd/yyyy format, and the range cannot exceed 1 year.
Running the Arm’s Length Sales Report for City/Town or Village

The Arm’s Length Sales report will list all reported arm’s length sales for a given municipality in a given time period. Information presented can be sorted by various parameters. Sorting is discussed later in this guide.

To run the Arm’s Length Sales report, first select either Arm’s Length City/Town or Arm’s Length Village from the Report Type menu. Next, select the municipality you wish to query. Finally, choose the date range, and then click on the “Run Report” button. A Report will be produced that will look like the following example, in which an Arm’s Length Sales report was run on the Town of Colonie for the time frame of 7/24/2006 to 10/24/2006.

If there is no data available for the criteria selected, the user will get this message:

From this point, if you want to try new parameters for the Arm’s Length Sales report, click on the corresponding button. If you want to try a different report, click on the “New Search” button.

* If running more than one Arm’s Length report for villages: After running the first report and returning to the main screen, it will be necessary to click on the reset button at the bottom of the screen to repopulate the village list. Then click on Arm’s Length Village, and continue as before.
The Potential Contradictions report will give the user a list of sales where a computer search found:

- Assessed value equals sale price.
- The transfer of property is potentially between relatives, based on similar entries in the buyer and seller name fields.

These sales are still classified as Arm’s length sales, and will be used for RAR and COD purposes, unless the assessor files a correction with ORPTS.

To run the Potential Contradictions report, select Potential Contradictions from the Report Type menu. Next, select the municipality you wish to query. Finally, choose the date range, and then click on the “Run Report” button. A report will be produced that will look like the following example, in which a Potential contradictions report was run on the Town of Dewitt for the time frame of 7/24/2006 to 10/24/2006.

If there is no data available for the criteria selected, the user will get this message:

From this point, if you want to try new parameters for the Potential Contradictions report, click on the corresponding button. If you want to try a different report, click on the “New Search” button.
Running the Excluded Sales Report

The Excluded Sales report will return a list of sales that have been flagged on the sales database to be non arm’s length, and will not be used for RAR and COD purposes. Corrections are not necessary unless you disagree with the exclusions.

To run the Excluded Sales report, select Excluded Sales from the Report Type menu. Next, select the municipality you wish to query. Finally, choose the date range, and then click on the “Run Report” button. A report will be produced that will look like the following example, in which an Excluded Sales report was run on the City of Albany for the time frame of 7/24/2006 to 10/24/2006.

If there is no data available for the criteria selected, the user will get this message:

From this point, if you want to try new parameters for the Excluded Sales report, click on the corresponding button. If you want to try a different report, click on the “New Search” button.
Sorting

Sorting options are available only on the Arm’s Length Sales for City/Town and Village reports. The Potential Contradictions reports and the Excluded Sales report do not have any sorting options. To use the sorting option, click on the “Advanced Sort” button which is in the upper left corner of the report screen.

From this screen you can choose up to three sort fields to organize your report. When finished selecting the sort criteria, click on the “Sort” button to return to the report with your sort criteria enacted.

For a quick sort, you can use the highlighted headings on the report screen. These include: Parcel ID, Buyer Name / Seller Name, Sale Date, and Property Use. Simply click on the heading you wish to sort by and the report will automatically sort by that heading. Only one of these sorting mechanisms can be used at a time.
For example, if you choose Parcel ID, and then choose Buyer Name, the entries will only be sorted by the last heading you chose, in this example Buyer Name.

**Printing Reports**

From the report screen, simply click on the “Print” button. The application will prompt you to set up your printer on the “landscape” orientation. The reports will not print correctly if this is not done.

We anticipate that these reports will give the user quick and easy access to sales information for their municipality. Please remember that it is **not** acceptable to print these reports for the sake of making written corrections on them and sending them back in to ORPTS. Any sales corrections must be submitted via RPS or by using the RP-5217ACR, Sale Correction Form. This form is available online at:

- [http://www.tax.ny.gov/pdf/current_forms/orpts/rp5217ac_fill_in.pdf](http://www.tax.ny.gov/pdf/current_forms/orpts/rp5217ac_fill_in.pdf) - City/Town Assessor Correction Form

- [http://www.tax.ny.gov/pdf/current_forms/orpts/rp5217ad_fill_in.pdf](http://www.tax.ny.gov/pdf/current_forms/orpts/rp5217ad_fill_in.pdf) - County Director Correction Form

- [http://www.tax.ny.gov/pdf/current_forms/orpts/rp5217av_fill_in.pdf](http://www.tax.ny.gov/pdf/current_forms/orpts/rp5217av_fill_in.pdf) - Village Assessor Correction Form
**Getting Help**

If you have any questions about this application, or need further assistance, call the Solutions Center at: 518-591-5233.

If your problem is not urgent, or if you have comments on the application, you can follow the link at the bottom of each page of the application, “Question/Comments Sales Reports Application”. This link will bring you to the following page, where you can enter your comments. ORPTS staff will review these comments and respond.